DOSTMARK ILLEGIBLE

| Yes No M | H all three tests for | spouse or dependent child because they mee | semed" income, or liabilities of a Committee on Ethics. | EXEMPTION - Have you excluded from this report any other assets, "unearned" income, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics. |
|--|--|---|---|--|
| Yes No 🗸 | łave you excluded | ner "excepted trusts" need not be disclosed. H | mmittee on Ethics and centain oil ependent child? | TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child? |
| S. | QUESTION | - ANSWER BOTH OF THESE | UST INFORMATION | EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS |
| | COMPLETE | THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE | ILY THE SCHEDULES | THIS FORM INCLUDES ON |
| | ğ | EDULE IF YOU ANSWER "YES" | ATTACH THE CORRESPONDING SCHEDULE IF YOU ANS | ATTACH THE C |
| Yes V No | \$5,000 from a 'years? | J. Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years? | Yes No | D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period? |
| or Yes No | agreement or arrangement with aning period or in the current calendar of | F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing? | Yes V No | G. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period? |
| g? Yes No 🗸 | ng the reporting ugh the date of liking | E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing? | Yee V No | A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? Of the properties of the period? On unserned income from any reportable asset during the reporting period? |
| | | TIONS | 刊 OF THESE QUES | PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS |
| A \$200 penalty shall be assessed against any Individual who files more than 30 days late. | A \$200 pensity s Individual who fi | Period Covered: January 1, lo | Staff Filer Type (If Applicable): Shared Principal Assistant | New Officer or Employee Employing Office: |
| (Office Use Only) | 0,000 | Check if Amendment | 8/18 | New Member of or Candidate for State: E U.S. House of Representatives District: Candidates – Date of Election: 8 28 |
| U.S. HULLE CENTENCES RIALIVES | Ų.s | hone: | Daytime Telephone: | Name: Stephen Marks |
| Page 1 of 8 LEGISLATIVE RESOURCE CENTER | [T] | FORM B For New Members, Candidates, and New Employees | | UNITED STATES HOUSE OF REPRESENTATIVES FINANCIAL DISCLOSURE STATEMENT |
| 0 | | | | |

SCHEDULE A - ASSETS & "UNEARNED INCOME"

| Examples: Single Cop Stock OC. Examples: Single & Schwall ABC Hoops Fund X Fixed Successes X Fixed Successes X Fixed Successes Fixed | Sc.000, tel every intercell reservour removement of the state of the s | coads the reporting threshold cost accounts, total the armor a secounts. If the total is | 3 8 | 70 2 3 | Assets and/or income Sources | BLOCK A |
|--|--|--|---------------------------------------|--|------------------------------|---------|
| | None \$1.51.000 \$1.001-\$15.000 \$15.001-\$50.000 \$50.001-\$100.000 \$700.001-\$250.000 \$700.001-\$1.000.000 \$700.001-\$250.000 \$500.001-\$1.000.000 \$5,000.001-\$250.0000 \$5,000.001-\$250.0000 \$5,000.001-\$250.0000 | | child in which you have no triberest. | indicate value of asset at close of the reporting period it you use a valueton method other then feer medical value, please specify the method used. If an asset was add during the reporting period and is included only baceuse it generated ancome, the value should be "Norse." "County the second that the value of dependent of the value of th | Value of Asset | вьоск в |
| | NONE OWIGENOS RENT UTEREST CAPITAL GAINS EXCEPTEDIBLING TRUST TAX-DEPERRED Coher Type of Income (Specify e.g., Partnership Income or Farm Income) | | during the reporting period. | Chock all octumes that apply. For accounts that appropriate fact-fields of income (such at 40 kg), IFA, or 529 accounts), you may chack the "Tax-Deferred" column. Ehrblands, he "Tax-Deferred" column, even if names, and capital gallos, even if names, and capital gallos, even if the factored as income or asystem, must be disclosed as income or asystem, the factored in the column. Chack the columns is the factored in columns. | Type of income | BYOOK C |
| × | Mone | Current Year | | For assale for which you checked "Taxi-Delemed" in Block C, you may check the "None" colvint. assets indicate the category of income by checking the appropriate box bastes. Dividends, it applies gaths, even if releviseded, must be disclosed as income for assets held in taxial Check "None" if no income was earned or generated. "Column XII is for assets held by your spouse or dependent child in which you have no interest. | Amount of Income | BLOCK D |
| × | \$1-\$200 \$10-\$1,000 \$1,001-\$2,500 \$2,501-\$3,000 \$15,001-\$50,000 \$15,001-\$50,000 \$50,001-\$1,000,000 \$1,000,001-\$5,000,000 \$1,000,001-\$5,000,000 \$50,001-\$0,000000 \$50,0001-\$0,000000000000000000000000000000 | EX DX X X DWA W IN A A W W W | | which you checked "Tax-Oderred" in Block C, you may check it to "None" column. For all other the calegory of income by checking the appropriate box below. Dividends, leaterest, and even if rehrvested, must be disclosed as income for assets held in taxable accounts, in or income was earned or generated. If no income was earned or generated. If nases held by your spouse or dependent child in which you have no interest. | Income | Ĝ |

Name: Strober Rocks Page of 8

| | ₹8.5 | | | | | | | | | | | | | |
|--|--------------|-----------------|--------------|--|----------------|--------------|--|--|---------------|-------------|--|--|-------------|---|
| BLOCK A Assets and/or Income Sources | asset hame | | | | | | | | | | | | | |
| None > | | | + | | | : | | | | | | | | |
| \$1-51,000 @ | | | · | : | | | | <u> </u> | 1 | - | ! L | | | |
| \$1.001-\$15.000 | | | | | | | - | <u> </u> | | : 1 | | | | |
| 313,007,550,000 | | | ! | | - | | | | 1 | <u> </u> | <u> </u> | ļ <u>.</u> | | |
| \$50,001-\$100,000 | | | | | - | | | | | 1 | | | | |
| \$50,001-\$100,000 TO \$250,000 TO \$250,001-\$1,000,000 TO \$250,000 TO \$25 | | | | ~*·*· | | | | ļl | <u>i</u> | ļ | : | | | |
| \$500,091-\$1,000,000 | | | : | - | 1 | | | | 1 | <u> </u> | ! | | | - |
| \$1,000,001-\$5,000,000 | | | | | | | ; | | 1 1 | + | | | | |
| \$5,000,001-\$25,000,000 | | | : | 1 | | | | | | | | | | _ |
| \$25,000,001-\$50,000,000 > | | | | : | ┼ | | , | : | -, | <u>:</u> | + - | - | | _ |
| Over \$50,000,000 ~ SpouseDC Asset over \$1,000,000* * | | | | | + | | - | - | <u> </u> | - | <u> </u> | ├ | ļ | |
| Spouse/DC Asset over \$1,000,000* %: NONE | | | } | † | + | + | | | | - | 1 | - | | - |
| DIVIDENDS | 1 | | • | ــــــــــــــــــــــــــــــــــــــ | 1 | | : | <u>+</u> | | <u>-i</u> | <u> </u> | - | · | - |
| | | | 1 | | Ť | | | 1 | | - | - | † | (| - |
| INTEREST | | | | | 1 | | | | | · | | | | - |
| RENT INTEREST CAPITAL GAMS EXCEPTED BUND TRUST TAX DEFERRED | | | | ; | | | | 1 | † | : | 1 | | ; ! | _ |
| EXCEPTED/BUND TRUST | | | | | | | | | | | | | | _ |
| TAX-DEFERRED 8 | | | 1 | - | | | | | 1 | | | | } | |
| Other Type of Income (Specify: e.g Partneship Income or Farm Income) | | | | | | | , | | • | | | [| | |
| None - | | | : | 1 | | | | | | | 1 | | | |
| \$1-200 = | | | | | | | : ' | <u>.</u> | | · | , | <u> </u> | | _ |
| \$201-\$1.000 | · | | · · · | | | | | ╀ | <u>`</u> | .i | <u>:</u> | - | , | _ |
| \$1,001-\$2,500 < C | | | ř | | 1 | <u> </u> | 1 | ╁── | | | - | ╁ | | |
| 22.591-25.000 < CUT of 25.001-2515.000 ≤ ST of 25.001-2515.000 ≤ ST of 25.001-2515.00,000 ≤ ST of 25.001-2515.000 ≤ ST of 25.001-2515.00,000 ≤ ST of 25.001-2515.0000 ≤ ST of 25.001-2515.000 ≤ ST of 25.001-2515.0000 ≤ ST of 25.001-2515.000 ≤ ST of 25.0000 ≤ ST of 25.0000 ≤ ST of 25.0000 ≤ S | † | - | ···· | | | | | -1 - | : | | | | · | |
| \$15,000,2\$0,000 | 1 | | | | | | | İ | ; | | : | 1 | | |
| \$50,001-\$100,000 \{\infty} | | | | | : | | | - <u>\</u> | | | | | | |
| \$100,001-\$1,000,000 👳 | | | | · | <u> </u> | | | <u> </u> | | | <u>; </u> | | <u>,</u> | |
| \$7,002.001-\$5,002.000 × Over \$5,002.000 ½ \$courseDC income over \$1,002.000 ½ None | | | | | - | | : 7 | - | į | • | - | | | |
| Spause DC Income over \$1,000,000" \$ 5 | ╂ | | | | | | | | | - i | | 1 | · | |
| Space DC income over \$1,000,000" \$ 00 CC | | | į | | 1 | - | : : | 1 | f | 1 | 1 | 1 | • | _ |
| \$1.5200 = 0 | | | | | - | | | | · | | | : | | |
| | <u></u> | | | | - | | <u> </u> | 4_ | : | | - | | | |
| \$1,001-\$2,500 | - | | | | - | | · | + | | | · | : | - | |
| \$2.501-\$5,000 < 6 \$5.001-\$75,000 | - | ` - | | | - | | : : | <u> </u> | <u></u> | - | <u>.i.,</u> | +- | - | _ |
| \$15,007-\$50,000 \$ 6 | 1 | | | | i | | · · | 1 | 1 | <u> </u> | i . | 1 | : | |
| 550.007-\$100.000 \{ \frac{1}{2} \} | | | | | | | | | | | | | | |
| \$100,001-\$1,000,000 🔀 | | | | | | | ; ; | | | į | | | | |
| \$1,000,001-35,000,000 × | 4 | | | | | | | - | | | | - | | _ |
| Over \$5,000,000 | - | | | | | <u> </u> | -iì | + | 1 | 1 | <u>.</u> | - - | | |
| Spouse/DC income over \$1,000,000" | | | | | | | | | | | | | | • |

Name: Stephen Marks

SCHEDULE A - ASSETS & "UNEARNED INCOME"

Page 3 of \$

SCHEDULE C - EARNED INCOME

Name: Stephen Marks Page 4 of 8

| and the special specia |
|--|
|--|

INCOME LIMITS and PROHIBITED INCOME: Be advised that the income limit and prohibited income may apply to you after you are on House payroll. The 2017 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,765. The 2018 limit is \$28,050. In addition, certain types of income (notably honorarie, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff.

| DEDIGESHOURS BLACKER & INTERNAL & | | | |
|--|--|--|--|
| | 1 | | Amount |
| Source (include date of receipt for honoraria) | Туре | Current Year to Filing | Preceding Year |
| AGC Yorks a servision Rudimore MD (LW 15) | Honorartum | 50 | \$500 |
| | Selary | \$20,000 | \$1,000 |
| EXEMPORES: Civil Was Roundtable (Oct. 2) Ontario County Board of Education | Spouse Salary | N/A | NA |
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SCHEDULE D - LIABILITIES

| reporting period by you, your spouse, or year in property including mortgages on | Name: |
|--|---------------|
| reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting year property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence | Stephen Marks |
| nt owed during the reporting | Page 5 of 8 |

(unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. "Column K is for liabilities held solely by your spouse or dependent child." Report liabilities of over \$10,000 owed to any one creditor at any time during the perfoot. New Members: Members are required to report all liabilities secured by

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| e de la completa del la completa de la completa de a compl | | | First Bank of Wilmangton, DE | Creditor | | |
| | | | 5/96 | Liability Incurred MO/YR | | |
| | e de la companya de de la companya d | | Mortgaga on Rantel Property, Dover, DE | Type of Liability | | |
| | | | | \$10,001- \$15,000 | * | |
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| | | | | \$50,001- \$100,000 | C | |
| | 1000 | | * | \$100,001- \$250,000 | 5 | |
| | | | | \$250,001- \$500,000 | en. | Mon |
| | | | | \$500,001- \$1,000,000 | الد | Amount of Liability |
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| | | | | \$5,000,001- \$25,000,000 | 3 | |
| | | | | \$25,000,001- \$50,000,000 | ~ | |
| | _ | 1 | | Over \$50,000,000 | ٠. | 1 |
| | - | | | | | |

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, as an officer, tristee of an organization, pertner, proprietor, representative, employee, or consultant of any corporation, illem, pertnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. New Members and second-year candidates report positions held in the reporting near than the current calendar year.

| - | - | | | _ |
|---|---|------|----------------------|--|
| | | | Position | Define and the current caterious year. Tiret-year candidates |
| | | | Name of Organization | Delico and the current chemical year. First-year candidates and new employees report positions need in the current calendar year and two previous years. |

SCHEDULE F - AGREEMENTS

Name: Stephen hacks page 6 of 8

| employer. | rrangement that you have with respect to: future employment; a lear other than the U.S. government; or continuing participation in an en | |
|-----------|--|--|
| | ave of absence during the period of government service; reployee welfare or benefit plan maintained by a former | |

| Date | Parties to Agreement | Terms of Agreement |
|------|----------------------|--------------------|
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SCHEDULE J -- COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Report sources of compensation received by you or your business effiliation for services provided directly by you during the current year and two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule C.

| government ar | nd any information considered confidential as a result of | government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information reset on Scriedure C. |
|---------------|---|--|
| | Source (Name and City/State) | Brief Description of Duties |
| Ехатрю: | Doe Jones & Smith, Hometown, Homestate | Accounting Services |
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Use additional sheets if more space is required.

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| | | | | | | PERSON loan by myself of Paso as to my campaign 4/2018 | PERSONAL loan by my self of \$200,000 to my compaign 4/2018 | NOTES |

FILER NOTES (Optional)

Name: Stephen Marks

Page & of

| | | | | | | | | | | NOTE NUMBER |
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| - capes convictions executes a sp. Wype as more | Arm to make the state of the st | | | | | | | The same against the sa | The first and the second secon | |

Instr# 115149583 , Page 1 of 3, Recorded 06/19/2018 at 03:53 PM

Broward County Commission

Deed Doc Stamps: \$0.70

THIS INSTRUMENT PREPARED BY AND IS TO BE RECORDED AND RETURNED TO:

LAWRENCE E. BLACKE, ESQ. 3326 North East 33rd Street Fort Lauderdale, Florida 33308-7110 (954) 566-5070

Property Appraisers Parcel I.D. (Folio) Number): 4941 05 BF 0040

TRUSTEES' DEED

(Testate)

WITNESSETH: That the said first parties, for and in consideration of the sum of \$10.00 in hand paid by the said second party, the receipt whereof is hereby acknowledged, do hereby remise, release and quit-claim unto the said second party forever, any and all rights, title and interest, claims and demands which the said first parties have in and to the following described lots, pieces or parcels of land, all situate, lying and being in the County of Broward, State of Florida, to-wit:

Unit 104, of WELDON CONDOMINIUM B., according to the Declaration of Condominium thereof, as recorded in Official Records Book 24071, Page 433, and any amendments thereto, of the Public Records of Broward County Florida.

Also known as: 9587 Weldon Circle, Unit #104, Tamarac, FL 33321

TOGETHER with all the tenements, hereditaments and appurtenances thereto belonging or in anywise appertaining.

To have and to hold the same together with all and singular the appurtenances thereunto belonging or in anywise appertaining, and all the estate, right, title, interest, lien, equity and claim whatsoever of the said first party, ether in law or equity, or the only proper use, benefit and behoof of the said second party forever.

IN WITNESS WHEREOF, the said first parties have signed and sealed these presents the day and year first above written.

Signed, sealed and delivered in our presence

Print Name & FRECCA A. MOORE

AWRENCE BRUCE MARKS, Individually and

as Successor Co-Trustee

113 Muir Lane

Chapel Hill, NC 27514

Print Name: Dana R. Bel

| STATE OF NOBTH CAROLINA |) |
|--|----|
| STATE OF NORTH CAROLINA COUNTY OF OYUNGE | _) |

I HEREBY CERTIFY that on this day, before me, an officer duly authorized to take acknowledgments, personally appeared LAWRENCE BRUCE MARKS, individually and as Successor Co-Trustee, to me known to be the persons described in and who executed the foregoing instrument and he acknowledged before me, under oath, that he executed the same.

WITNESS my hand and official seal in the County and State last aforesaid this _____ day of ______, 2018.

(SEAL)

Notary Public - STATE OF NORTH CAROLINA
Print Name: Patricia D. Suits

My commission expires: May 25, 2022

| Signed, sealed and delivered in our | presence: | | |
|--|------------------------|---|----------------------------|
| WITNESSES: | | | |
| Print Name: Season Secondary Seconda | inser India | STEPHEN MARKS, Successor 9587 Weldon Circle, #104 Tamarac, FL 33321 | (LS.) Co-Trustee |
| STATE OF FLORIDA COUNTY OF BROWN I HEREBY CERTIFY the personally appeared STEPHEN M and who executed the foregoing is same. | ARKS, as Successor | | the persons described in |
| WITNESS my hand and May 2018. | official seal in the C | ounty and State last aforesaid th | is 17 th day of |
| | | | |
| (SEAL) | Print | -STATE OF FLORIDA SAN R DYER | Name: |
| | | BUSAN R. DYER | 3 |



STEPHEN MARKS BENE IRA HYMAN MARKS (DECD) WFCS AS CUSTODIAN

IAMAHAC FL 33321-0940

SNAPSHOT

Current period ending June 30, 2018

ACCOUNT NAME:

STEPHEN MARKS BENE IRA HYMAN MARKS (DECD) WFCS AS CUSTODIAN

ACCOUNT NUMBER:

Your Financial Advisor: RICHMAN/GROSS Phone: 917-351-2000 / 800-223-0610

ONE PENN PLAZA 27TH FLOOR NEW YORK NY 10119

If you have more than one account with us, why not link them and receive summary information for your entire household? Contact Your Financial Advisor for more details.

Message from Wells Fargo Advisors

DID YOU KNOW YOU CAN RECEIVE YOUR TRADE CONFIRMATIONS AND TAX INFORMATION ONLINE? PLEASE CONTACT YOUR FINANCIAL ADVISOR FOR MORE INFORMATION AND THE STEPS YOU CAN TAKE TO HELP MAKE THIS HAPPEN.

Investments and insurance products are:

NOT FDIC-INSURED

URED NO

NO BANK GUARANTEE

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

E MAY LOSE VALUE

SNAPSHOT 001 54 S4H7

ACCOUNT NUMBER:

Progress summary

| \$55,788.92 | \$55,788.92 | Closing value |
|-------------|-------------|----------------------|
| -453.60 | 207.63 | Change in value |
| 0.00 | 0.00 | Securities withdrawn |
| -13,002.41 | 0.00 | Cash withdrawn |
| 0.00 | 0.00 | Securities deposited |
| 10.85 | 0.00 | Cash deposited |
| \$69,234.08 | \$55,581.29 | Opening value |
| THIS YEAR | THIS PERIOD | |

As a Wells Fargo Advisors client, you can upgrade your investment account to add Brokerage Cash Services at no additional cost. Brokerage Cash Services provides access to convenient money movement options including mobile deposit services. It also includes teller deposit services at Wells Fargo branch locations which are provided through a limited purpose Bank account. You'll have access to many more features and benefits to help you manage your finances. It's as simple as talking with Your Financial Advisor. Ask them today about Brokerage Cash Services.

Portfollo summary

| Asset value | ASSETS Cash and sw Stocks, option Fixed income Mutual funds | ASSET TYPE |
|-------------|---|-----------------------------|
| • | Cash and sweep balances Stocks, options & ETFs Fixed income securities Mutual funds | PR |
| \$55,581.29 | 286.92 0.52 0.00 0.00 22,781.69 40.99 32,512.68 58.50 | PREVIOUS VALUE ON MAY 31 |
| 100% | 0.52 0.00 40.99 58.50 | % |
| | 406.65 0.00 22.781.31 32,600.96 | CURRENT VALUE ON JUN 30 |
| 100% | 0.73 0.00 40.83 58.44 | % |
| \$1,306 | 1 0 376 929 | ESTIMATED ANN. INCOME |

CUSTOMOHOICE



STEPHEN MARKS

TAMANAUTL 33321-0940

SNAPSHOT Current period ending June 30, 2018

STEPHEN MARKS

ACCOUNT NAME:

ACCOUNT NUMBER:

Your Financial Advisor:
RICHMAN/GROSS

Bhone: 047-354-3000 / 90

Phone: 917-351-2000 / 800-223-0610

ONE PENN PLAZA 27TH FLOOR NEW YORK NY 10119

If you have more than one account with us, why not link them and receive summary

information for your entire household? Contact Your Financial Advisor for more details

Message from Wells Fargo Advisors

DID YOU KNOW YOU CAN RECEIVE YOUR TRADE CONFIRMATIONS AND TAX INFORMATION ONLINE? PLEASE CONTACT YOUR FINANCIAL ADVISOR FOR MORE INFORMATION AND THE STEPS YOU CAN TAKE TO HELP MAKE THIS HAPPEN.

News

GET MORE DONE IN LESS TIME WITH WELLS FARGO MOBILE DEPOSIT. DEPOSIT CHECKS INTO YOUR BROKERAGE ACCOUNT WITH CASH SERVICES USING THE WELLS FARGO MOBILE APP ON YOUR MOBILE DEVICE. IT'S FAST, EASY, AND SECURE.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

investments and insurance products are:

NOT FDIC-INSURED

NO BANK GUARANTEE

MAY LOSE VALUE

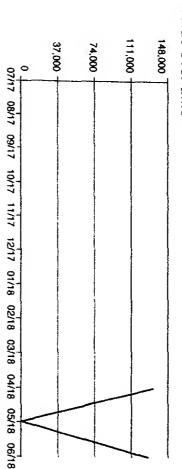
STEPHEN MARKS

JUNE 1, 2018 - JUNE 30, 2018 ACCOUNT NUMBER: 1

Progress summary

| \$127,736.83 | \$127,736.83 | Closing value |
|--------------|--------------|----------------------|
| 35.74 | -21.91 | Change in value |
| 0.00 | 0.00 | Securities withdrawn |
| -532,843.42 | -37.03 | Cash withdrawn |
| 304,969.50 | 0.00 | Securities deposited |
| 355,575.01 | 127,766.58 | Cash deposited |
| \$0.00 | \$29.19 | Opening value |
| THIS YEAR | THIS PERIOD | |

Value over time



Portfolio summary

CURRENT



ASSET TYPE

PREVIOUS VALUE ON MAY 31

%

CURRENT VALUE ON JUN 30

%

ESTIMATED ANN. INCOME

ASSETS

Cash and sweep balances Stocks, options & ETFs Fixed income securities
Mutual funds

-126,979.70 0.00 127,008.89 \$29.19 0.00 0.00 0.00 0.00 100% \$127,736.83 752.07 0.00 126,984.76 0.00 100% 0.59 0.00 99.41 0.00

\$2,225

2,223

Negative values are not included in percent calculations.

Asset value

THE HYMAN AND HELEN MARKS REVO C/O LAWRENCE MARKS TR LAWRENCE MARKS TTEE ET AL U/A DTD 10/15/2016 113 MUIR LANE CHAPEL HILL NC 27514-1452

SNAPSHOT

Current period ending June 30, 2018

ACCOUNT NAME:

C/O LAWRENCE MARKS TR THE HYMAN AND HELEN MARKS REVO

LAWRENCE MARKS TTEE ET AL U/A DTD 10/15/2016

ACCOUNT NUMBER:

RICHMAN/GROSS Your Financial Advisor:

Phone: 917-351-2000 / 800-223-0610

ONE PENN PLAZA 27TH FLOOR

NEW YORK NY 10119

information for your entire household? Contact Your Financial Advisor for more details. If you have more than one account with us, why not link them and receive summary

Message from Wells Fargo Advisors

STEPS YOU CAN TAKE TO HELP MAKE THIS HAPPEN. GET MORE DONE IN LESS TIME WITH WELLS FARGO MOBILE DEPOSIT. DEPOSIT CHECKS INTO YOUR BROKERAGE ACCOUNT WITH CASH SERVICES USING THE WELLS FARGO MOBILE News DID YOU KNOW YOU CAN RECEIVE YOUR TRADE CONFIRMATIONS AND TAX INFORMATION ONLINE? PLEASE CONTACT YOUR FINANCIAL ADVISOR FOR MORE INFORMATION AND THE

APP ON YOUR MOBILE DEVICE, IT'S FAST, EASY, AND SECURE.

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SNAPSHOT

THE HYMAN AND HELEN MARKS REVO
C/O LAWRENCE MARKS TR
LAWRENCE MARKS TTEE ET AL STEPHEN MARKS
U/A DTD 10/15/2016 U/A DTD 10/15/2016

JUNE 1, 2018 - JUNE 30, 2018

ACCOUNT NUMBER

Page 1 of 7

Progress summary

| \$201,552.84 | \$201,552.84 | Closing value |
|--------------|--------------|----------------------|
| -601.04 | -1,828.94 | Change in value |
| -696,780.20 | 0.00 | Securities withdrawn |
| -61,681.22 | 0.00 | Cash withdrawn |
| 0.00 | 0.00 | Securities deposited |
| 144,676.76 | 0.00 | Cash deposited |
| \$815,938.54 | \$203,381.78 | Opening value |
| THIS YEAR | THIS PERIOD | |

| 07/1 | 0 | 261,000 | 522,000 | 783,000 | 1,044,000 | Value over time |
|---|------|---------|---------|---------|-----------|-----------------|
| 07/17 08/17 09/17 10/17 11/17 12/17 01/18 02/18 03/18 04/18 05/18 06/18 | | | | | | time |
| 09/17 | İ | | | | | |
| 10/17 | | | | | | |
| 11/17 | | | - | | | |
| 12/17 | | | | | | |
| 01/18 | | | | ' | | |
| 02/18 | | | | | | |
| 03/18 | | | | | لـ | |
| 04/18 | | + | | | | |
| 05/18 | | | | | | |
| 06/18 | | | 1 | | | |

Portfolio summary

CURRENT

ASSET TYPE

8

å

ESTIMATED ANN. INCOME

ASSETS

Stocks, options & ETFs Fixed income securities Cash and sweep balances

Asset value

\$203,381.78

100%

\$201,552.84

100%

\$3,961

3,780

111,124.20

90,428.64 0.00 0.00

44.87 0.00 55.13 0.00

Mutual funds PREVIOUS VALUE ON MAY 31 112,968.00 90,413.78 0.00 0.00 44.46 0.00 55.54 0.00 CURRENT VALUE ON JUN 30